TRIAL EXHIBIT 5183

Android

OC Quarterly Review – Q1 2009

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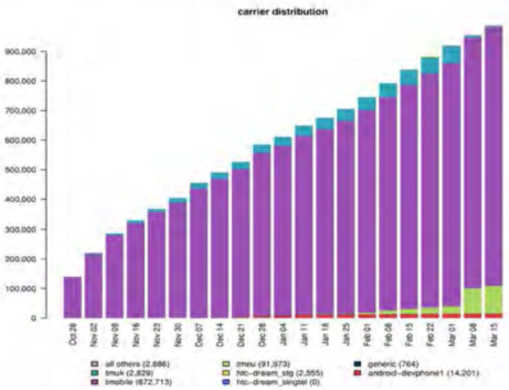
UNITED STATES DISTRICT COURT
NORTHERN DISTRICT OF CALIFORNIA
TRIAL EXHIBIT 5183
CASE NO. 10-03561 WHA
DATE ENTERED ____________
BY ____________________
DEPUTY CLERK

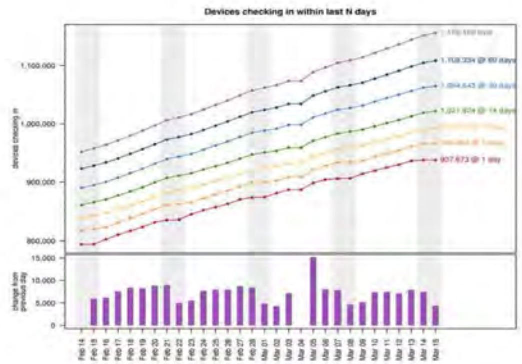
Summary

- Budget actuals lower than plan
- Deployments exceeding plan
  - 7 countries
  - 13 languages
  - 19 design wins!
- Marketshare at 6% of mobile browsing
  - Ahead of Blackberry, Palm
  - Roughly equal to Windows, Symbian
- Search RPM is $22.70
  - Usage of search widget key contributor
- Three prong strategy working
  - Organic, Unbundled and Google Experience: All have customer traction
- Pain points: Scaling, hiring, UI, ecosystem

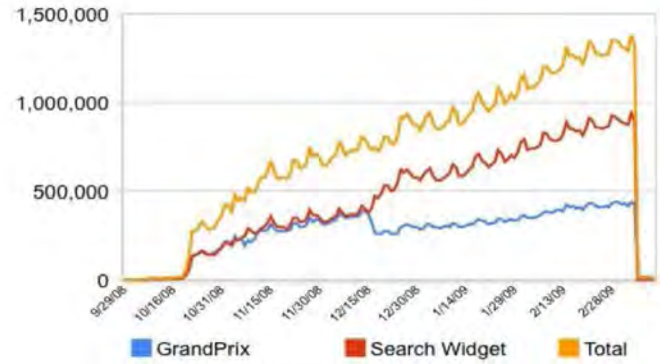
Health Check



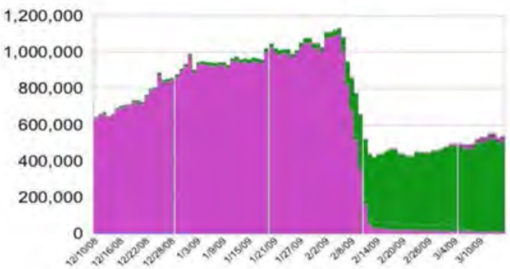
Subscribers



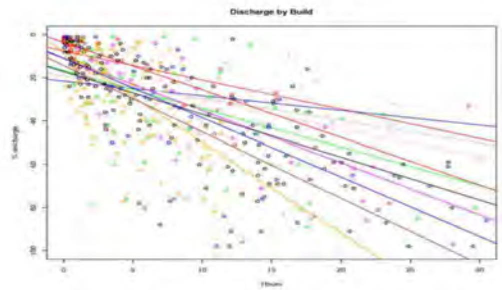
7 day active



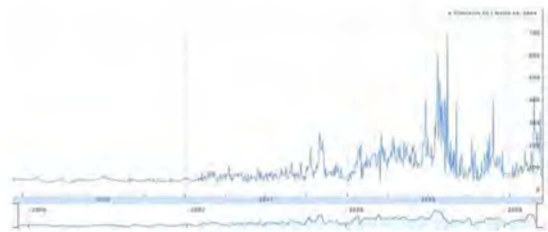
Search Queries



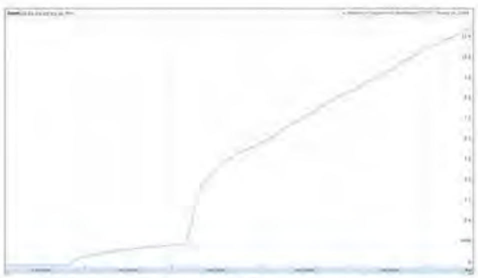
ANRs per day



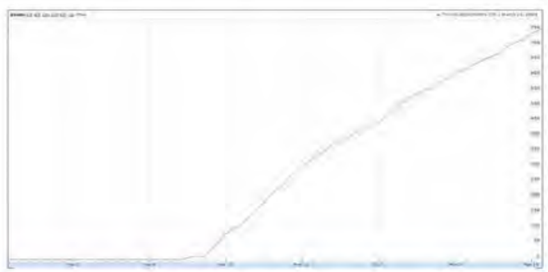
Battery life improvements



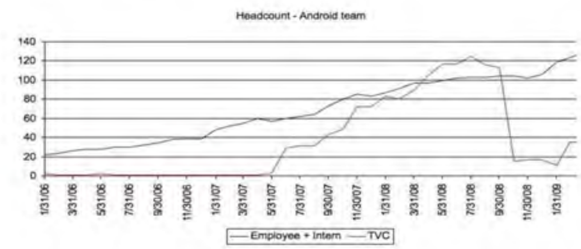
Check-ins over time



Developers



Paid Apps



Headcount

OKRs

'09 Focus is on scale

- 20M Android-powered devices by EY09

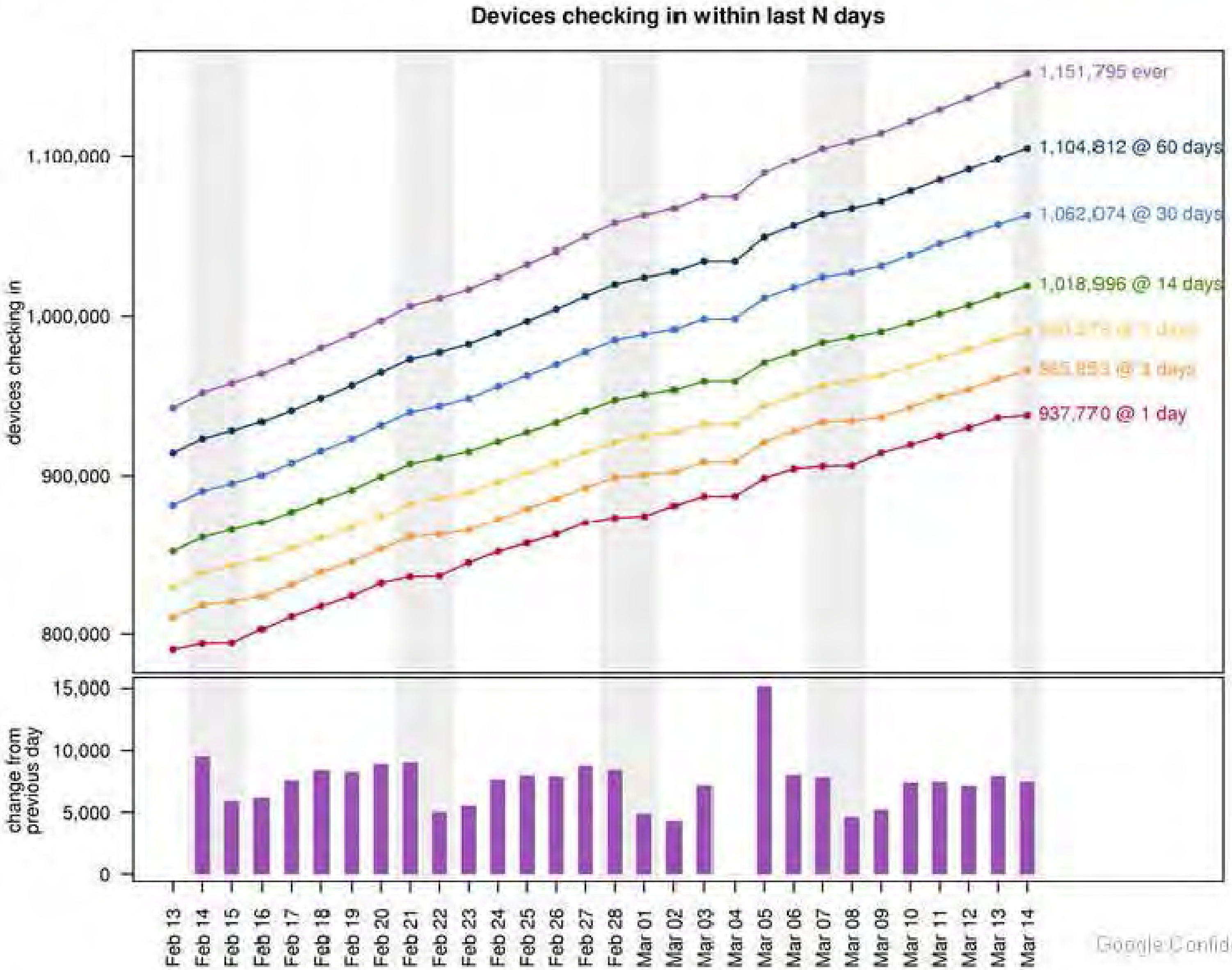
Q1 '09

- Cupcake release launched
- Significant latency and battery life improvements
- Improvements to UI (polish)
- Improvements to camera/video
- Photos mirrored
- Launch new device

Google

Product Update (Erick Tseng)

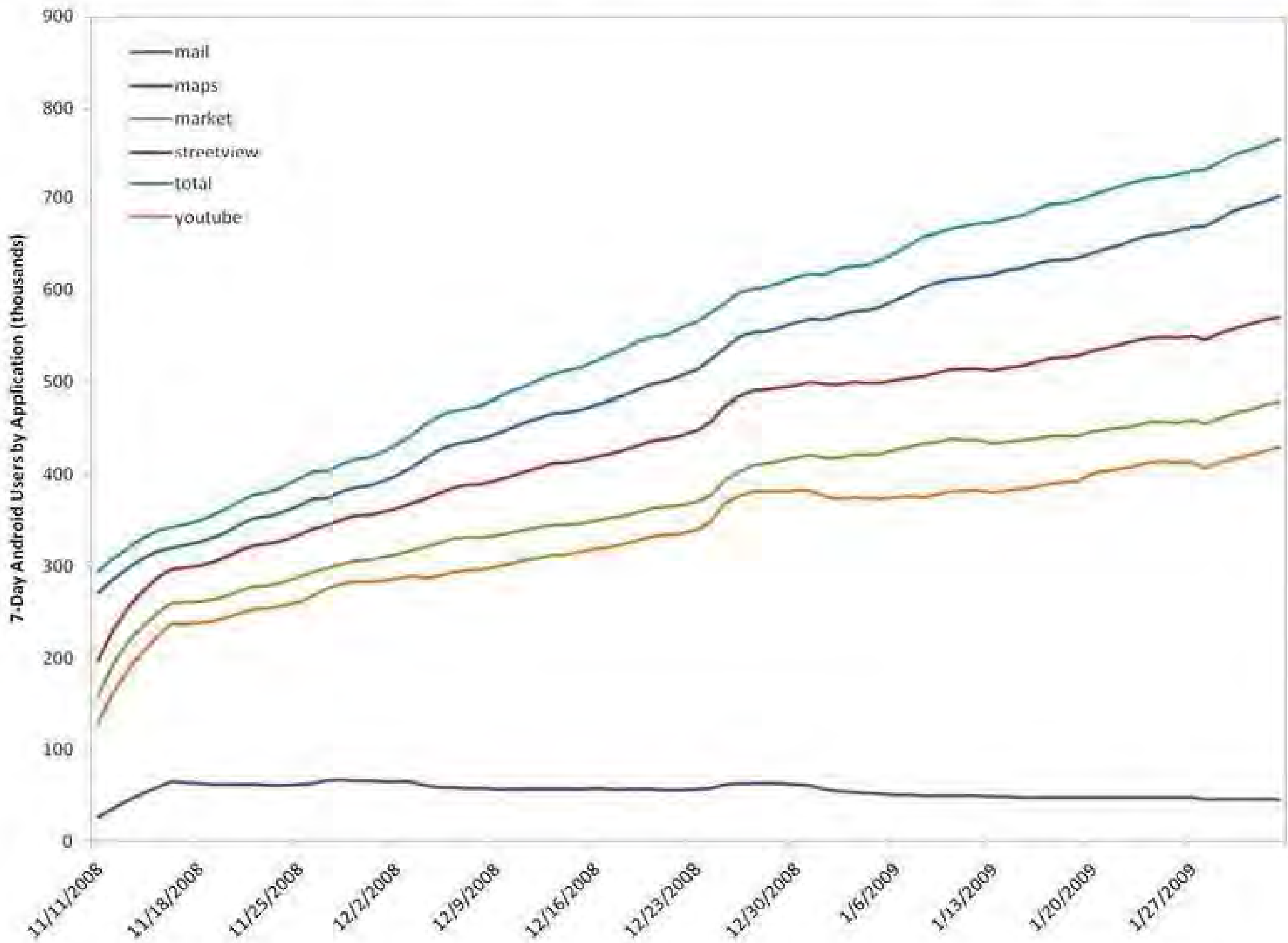
1 Million Devices Sold in First 4 Months



Google Confidential and Proprietary

92% of Android 7-Day Actives Use Gmail

Google



Other Apps

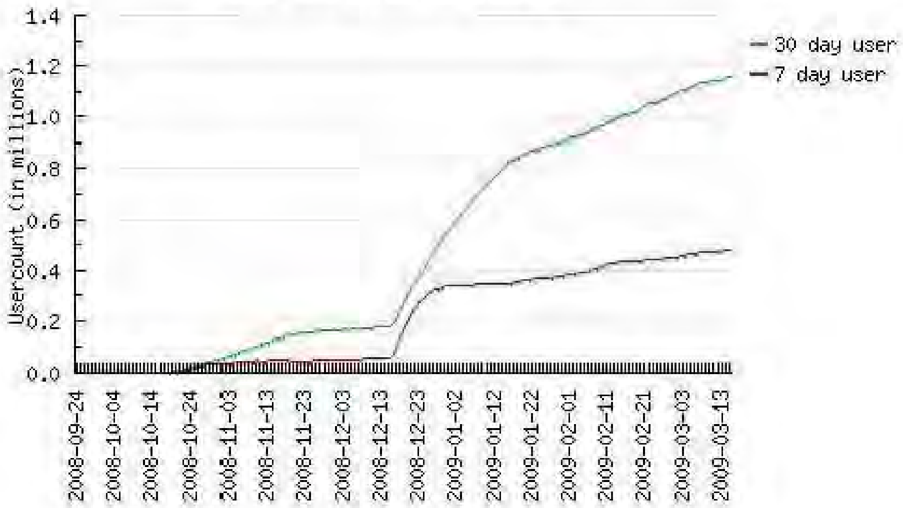
- Maps: 80%
- Marketplace: 68%
- YouTube: 61%
- StreetView: 11%

[1] Source: Android Dashboard (3/16/2009), https://dash/mobile/generic_product_overview.php?daterange=99999&pagename=android&showEventsTable=false

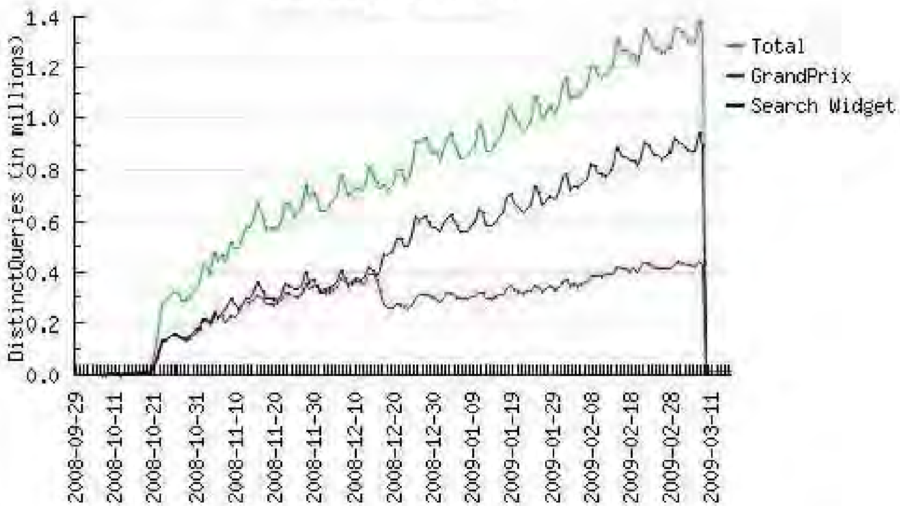
Search + Android = Huge

Google

Unique search users



Search queries

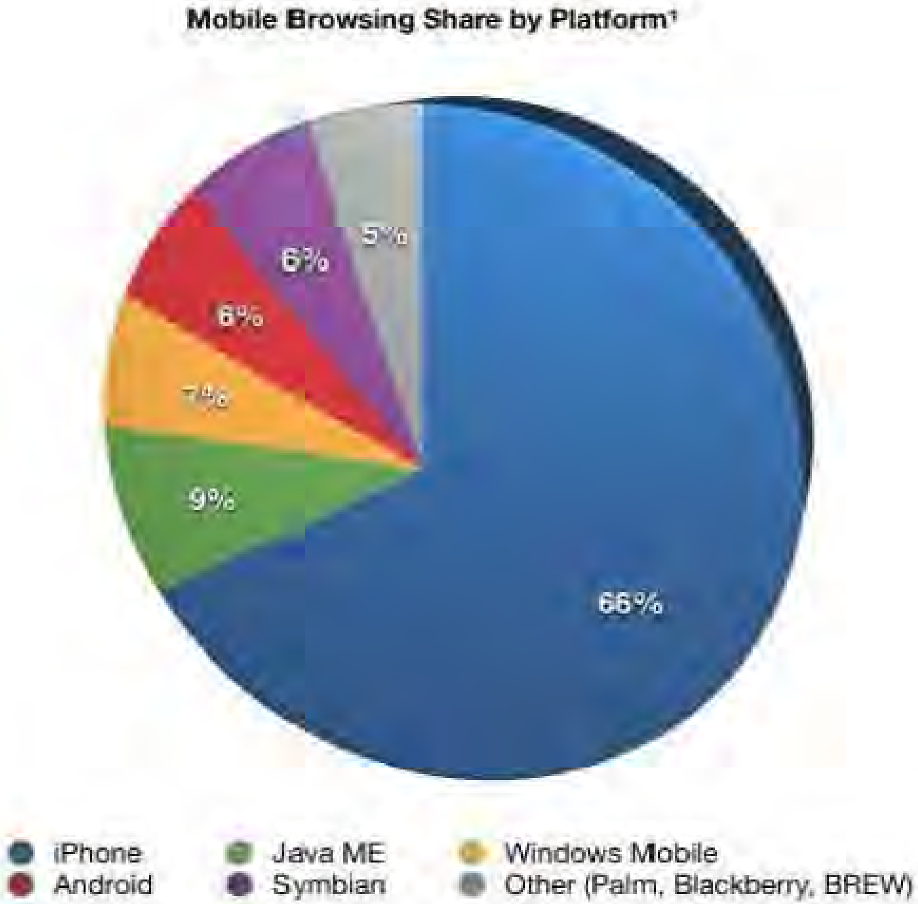


- **Nearly 100%** of our users have searched in the last 30 days
- **43% of our users** have searched in the last 7 days

- **Speed matters**: 70% of all searches are initiated from Android search framework, rather than google.com website

Mobile Browser Share

Google



- Android reached 6% mobile browsing share **4 months** after launch
- Symbian reached the same milestone in **10 years**

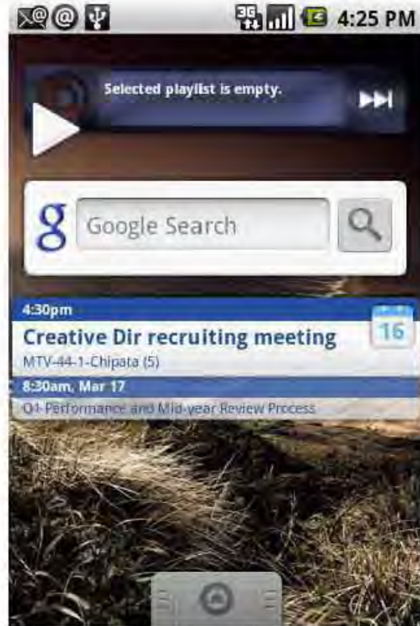
- AdMob processed **48M ad requests** in February, the first month they launched Android ads
- In comparison, AdMob processed 50M ad requests the first month it launched iPhone ads last August

[1] Source: Net Applications Q4 2008 Mobile OS Market Share report.
URL: http://marketshare.hitslink.com/mobile-phones.aspx?qprid=55

Product Roadmap (1/2)

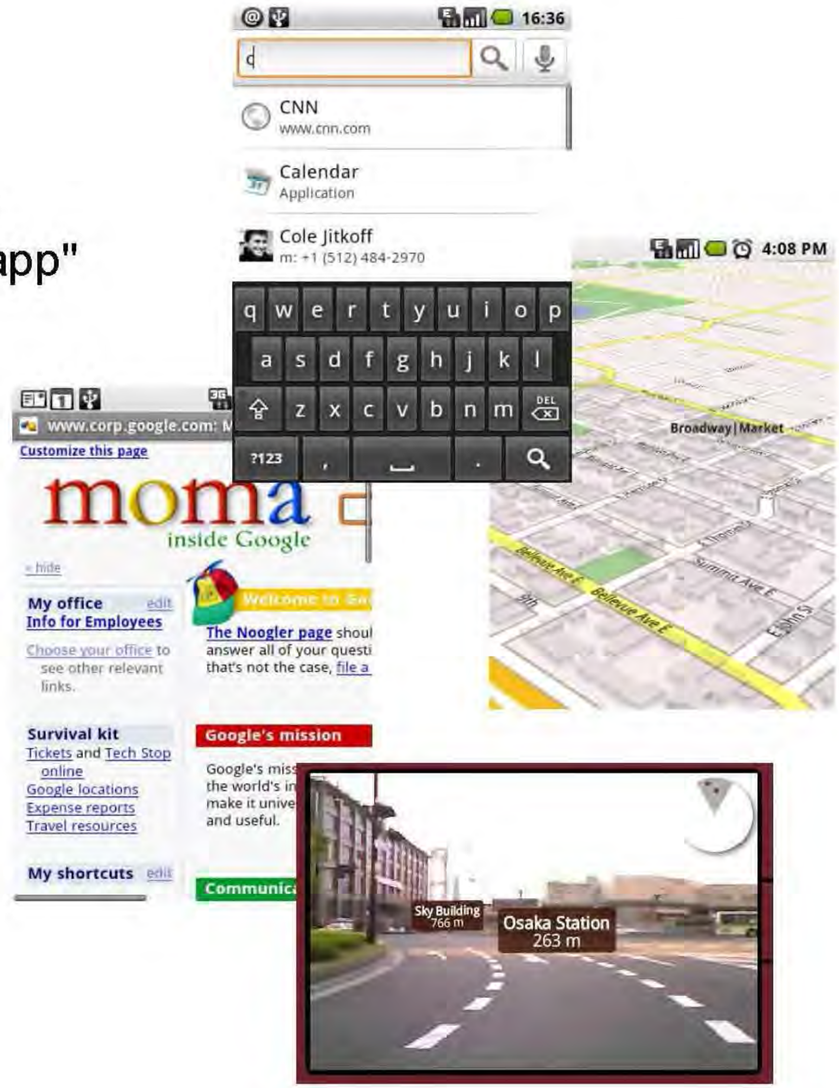
Google

- Cupcake (Q2 2009)
  - On-screen QWERTY keyboard
  - Video record and playback
  - YouTube uploads and "My Account"
  - Picasa Upload
  - Improved camera
  - Homescreen widgets
  - Stereo Bluetooth/A2DP
  - Browser Omnibox
  - Pervasive IM presence
  - New in-call keypad/timeout UI
  - Improved battery life
  - Framework refresh



Product Roadmap (2/2)

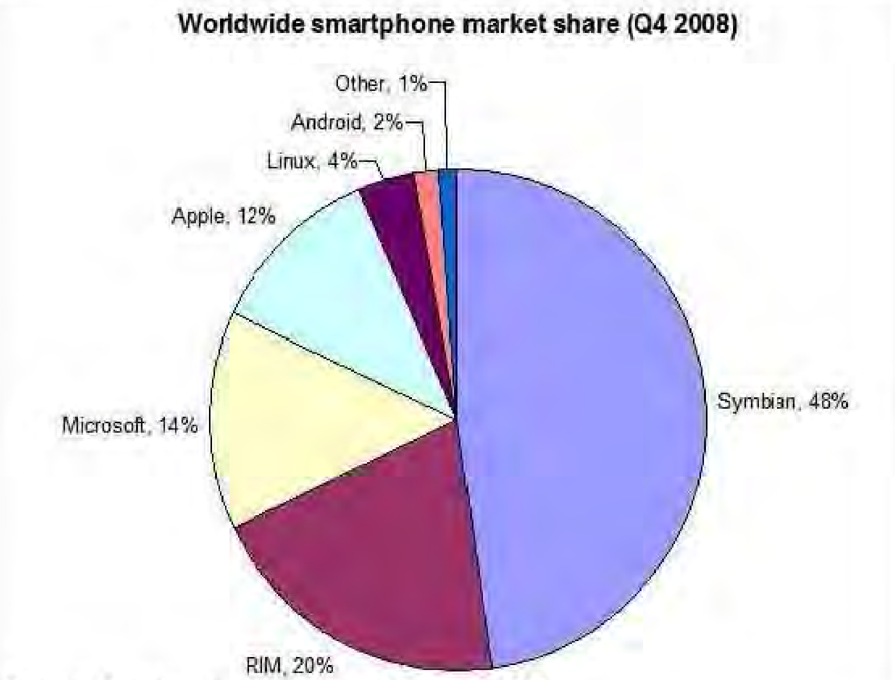
- Donutburger (Q3 2009)
  - Phone top "universal" search
  - Gesture shortcuts
  - Camera/Photos update
  - Enterprise features: VPN, IPSec
  - Backup settings and bookmarks to the cloud
  - Market update: 3rd party billing, "Share this app"
  - Integrate V8 engine in browser
  - Text to speech engine
  - App Fuel Gauge: for better battery mgmt
  - Live Wallpaper
  - DPI support
  - CDMA
- Eclair (Q4 2009)
  - All new user interface
  - Vector Maps with turn-by-turn directions
  - Augmented reality navigation
  - ActiveSync/Exchange support
  - Calendar update (view/add attendees)
  - Support for multiple accounts
  - Unveil: image recognition and OCR
  - Flash 10



Google

Product Challenges

- Scaling to meet usage goals: 20M users by end of 2009
- Continuing to innovate killer apps
- Multiple product configurations
- Fragmentation
- iPhone: 72 countries, 3.0 Firmware
- Market: quantity (2K apps vs. iPhone's 25K apps) and quality
- Innovating a next generation UI



Source: Canalys, smartphone analysis, Q4 2008

Engineering Update (Hiroshi Lockheimer)

Google

Dissecting the roadmap: Deployment vs. Innovation

'09 Releases	Deployment	Innovation
Cupcake (April)	- Touch-only form-factor (Voda, DoCoMo, T-Mobile US) - Perf (updated WebKit), battery life - UI refresh	- Bluetooth stereo headset - Video record (and playback), including YT upload - Picasa integration - Home screen gadgets
Donutburger (July)	- DPI support (WVGA, QVGA, new form-factors) - CDMA plumbing - Perf (V8?), battery life (new sync protocol)	- Universal Search - Gesture shortcuts - Cloud backup (settings, bookmarks) - Active wallpapers - TTS
Eclair (October)	- Holiday '09 Google Experience Devices (Verizon, TMUS) - HW accelerated graphics, 3D	- Next generation UI

Deployment vs. Innovation = Platform vs. Product
(balancing Google's needs and ecosystem requests)

Engineering Update (cont'd)

Google

Organization

- Before: ~70 direct reports
- Now: ~20 direct reports, 9 teams
- Focus on: scale, communication, accountability

Challenges

- Deployment vs. Innovation, Platform vs. Product
- Dates, dates, dates
  - Upfront release planning
  - Parallel development
- Hiring (*filling* reqs, not reqs)
  - Bringing core innovation back in house (app, UI developers)

Android Services (Michael Morrissey)

Not a single service, but a collection of 7 services which rely on caribou, doozer, focus, buzz, youtube, checkout, kansas, gaia, megastore, blobstore, st, zipit, goops, chubby/svelte, cart, crash2, cdd...and all the services they rely on

Footprint

- Frontends in 4 DCs (Oregon, Atlanta, East, Belgium)
- Backends in 3 DCs (Iowa, Atlanta, East)
- Need to expand into Europe & Asia to match deployments
- Projected resource spend for 2009: $586K

Scalability issues

- Must greatly improve FE machine utilization
  - Only 20k connections/machine at present
  - Bin-packing with Buzz to increase capacity
- Move FE machines out of CLIBs where machines are scarce

Challenges

- Dependency management for other Google services
- Handling carrier networking issues
- Hiring -- particularly for Market

Android P&L

Google

amounts shown in $ millions	Q3	Q4	FY 2008	Annual Plan Q1	Q2	Q3	Q4	FY 2009
Gross Revenue	$ 0.0	$ 0.7	$ 0.7	$ 2.4	$ 2.2	$ 3.6	$ 5.1	$ 13.3
TAC	0.0	0.2	0.2	0.5	0.5	0.8	1.2	2.9
Net Revenue	**$ 0.0**	**$ 0.5**	**$ 0.5**	**$ 1.9**	**$ 1.7**	**$ 2.8**	**$ 3.9**	**$ 10.4**
Net Margin	*N/A*	*73%*	*73%*	*81%*	*78%*	*77%*	*77%*	*78%*
Q-O-Q Growth				*252%*	*-8%*	*61%*	*40%*	
Operations	0.1	0.1	0.2	0.1	0.1	0.1	0.1	0.3
Other COS	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Gross Profit	**$ (0.1)**	**$ 0.4**	**$ 0.3**	**$ 1.8**	**$ 1.7**	**$ 2.7**	**$ 3.8**	**$ 10.0**
Gross Margin	*N/A*	*59%*	*46%*	*77%*	*74%*	*75%*	*76%*	*75%*
Direct Expenses								
Sales	0.2	0.3	0.9	0.5	0.5	0.5	0.5	2.1
Marketing	0.1	12.1	12.3	13.0	7.8	7.8	7.8	36.3
PM	0.0	0.0	0.0	0.3	0.3	0.3	0.3	1.1
Engineering	29.2	18.4	86.3	17.5	15.6	13.1	13.3	59.5
G&A	0.3	0.3	1.0	0.3	0.3	0.3	0.3	1.1
Product Contribution	**$ (29.9)**	**$ (30.5)**	**$ (100.3)**	**$ (29.7)**	**$ (22.8)**	**$ (19.3)**	**$ (18.4)**	**$ (90.1)**
Contribution Margin	*N/A*	*-4,122%*	*-13,547%*	*-1,260%*	*-1,021%*	*-532%*	*-361%*	*-678%*
Headcount								
Sales			6					10
Marketing			0					2
PM			3					5
Engineering (SWE, Test, Tech Writers, UX)			109					141

Handset Volumes Drive Revenue Growth

- Goal: ship 20 million Android enabled handsets by year-end 2009
- Search widget and browser search box drive 80% of Android revenue (est. $10.6 million)
  - TAC rate 24 - 32%
- Organic revenue contributes an addition $2.7 million

Carrier Adoption, Co-Branding

- Adding carriers in Japan and EMEA during first half 2009. China in late 2009
- Focus on developing partnerships with mass carriers (+50 million subscribers)
  - $10 million per co-branding deal, contingent upon data plan guarantees

Search Stats

Android and iPhone queries are similar in length.
(Android: 2.73 iPhone: 2.8)

Android users trigger spell correct *less* often that iPhone users.
(Android 10.54% iPhone 12.89%)

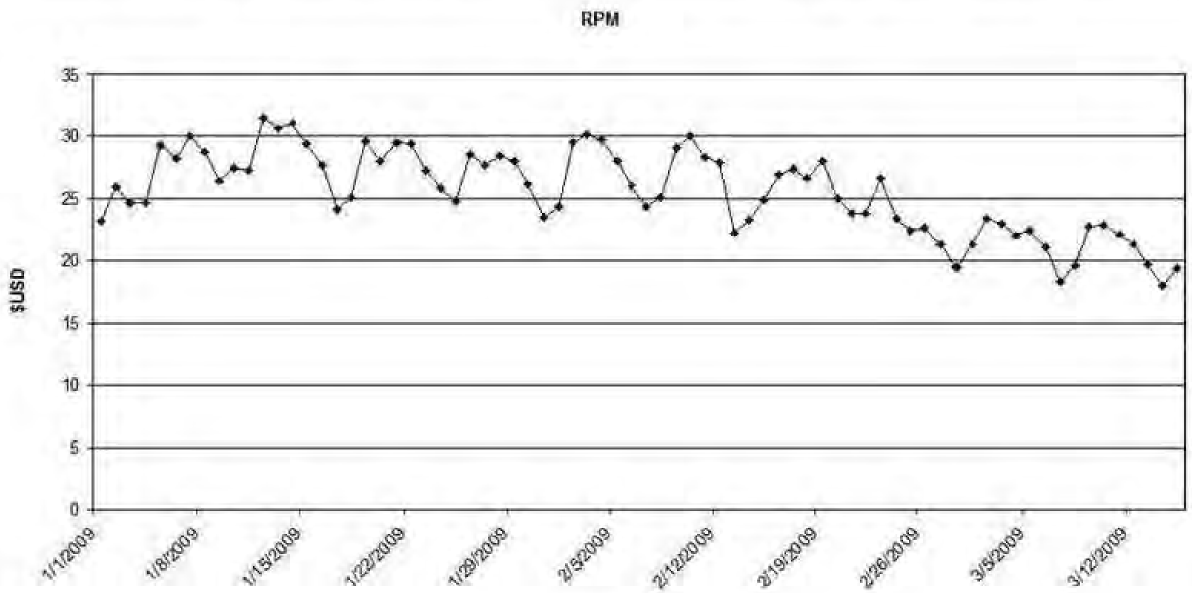
iPhone query categories and Android query categories are similar.
(Android users issue less sports queries than iPhone users, but issue more Online Communities queries).

Android users query more often than iPhone users per day.
(Android: 6.69 iPhone 5.44 avg queries per week)

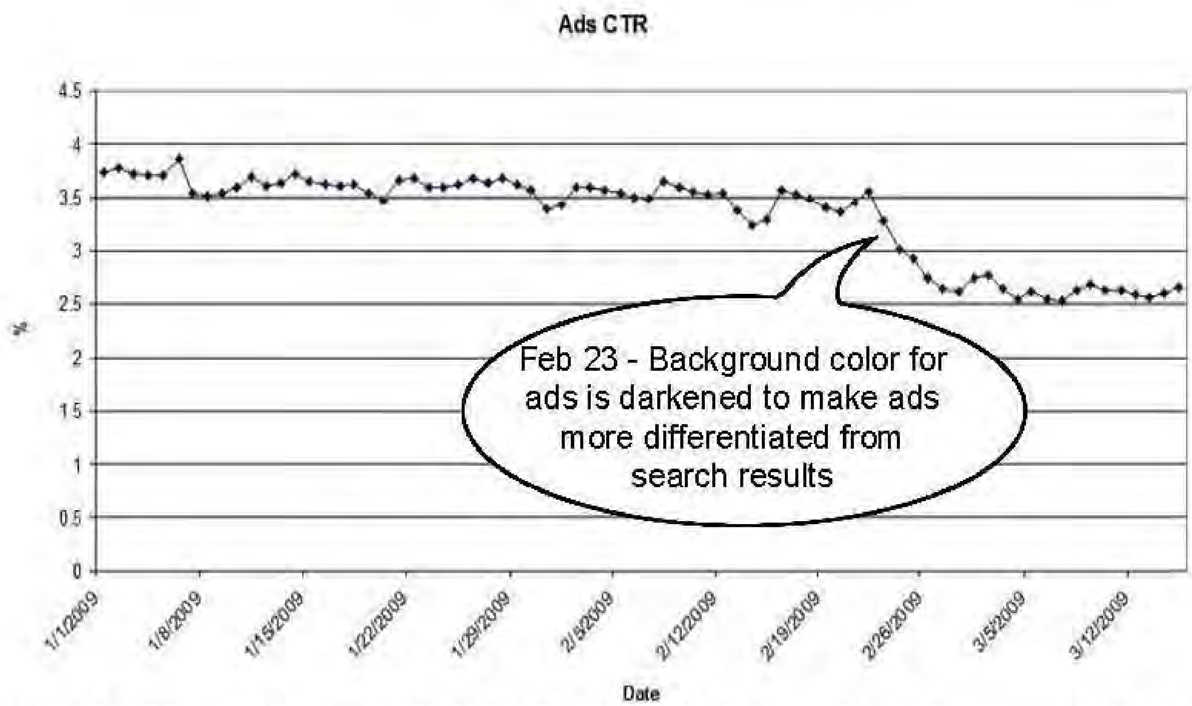
Source: Maryam Kamvar: Search Log Analysis

Theme: Monetization (Erick Tseng)

Google



- Android RPM: $22.70
- iPhone RPM: $15.10



- Android CTR: 2.6%
- iPhone CTR: 2.2%

Theme: Scale (Jennie Ebbitt & Patrick Brady)

Google

GOOGLE EXPERIENCE

- T-Mobile: Amendment negotiations underway
- Singtel/Optus: Completed
- Vodafone (5 Op Cos): Completed
- Docomo: DA negotiations underway
- Verizon: Term sheet negotiations underway
- CMCC: Working with CMCC OEMs
- China Unicom: Exploratory

Unbundled GMS + Android OS

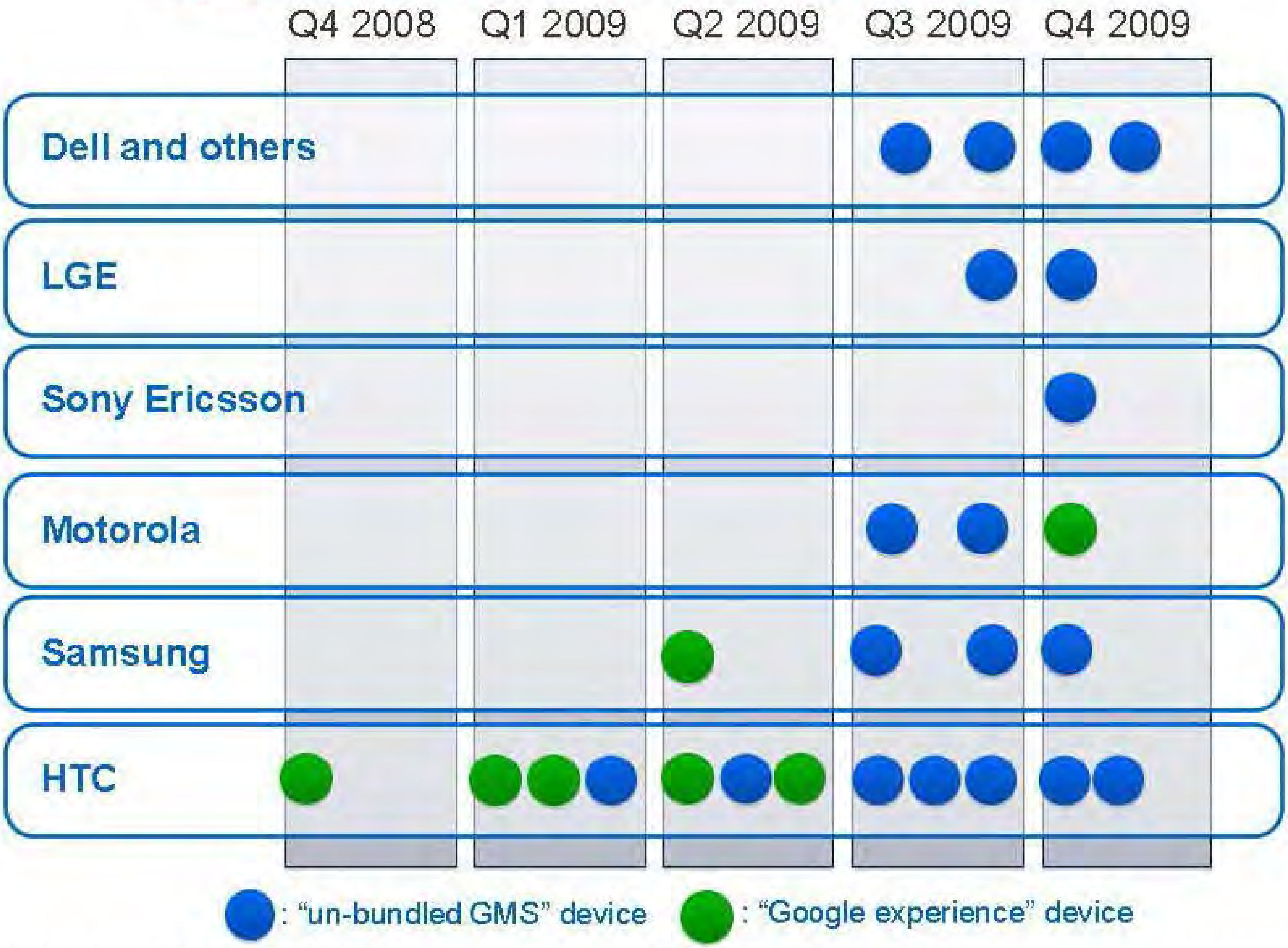
- OEM pipeline
  - HTC
  - MOT
  - Dell
  - Samsung
  - SEMC
  - ASUS
  - LG
  - Lenovo
  - Acer
  - Quanta
  - Kyocera
  - Huawei
  - Sharp
  - Toshiba
  - Panasonic
  - NEC
  - Inventec
  - Foxconn
- Android Market for Operators
  - Sprint
  - Rogers

Other key Android deals:

- Paypal for Android market
- AMDOCS for Carrier Billing
- SVOX: text to speech
- ASUS: Google device
- Android everywhere
  - Android for TV discussions w/ Ben
  - Android for netbook discussions w/ Sundar

Theme: Scale (cont'd)

Represents current plans. Not all launches confirmed.



Theme: Scale (cont'd)

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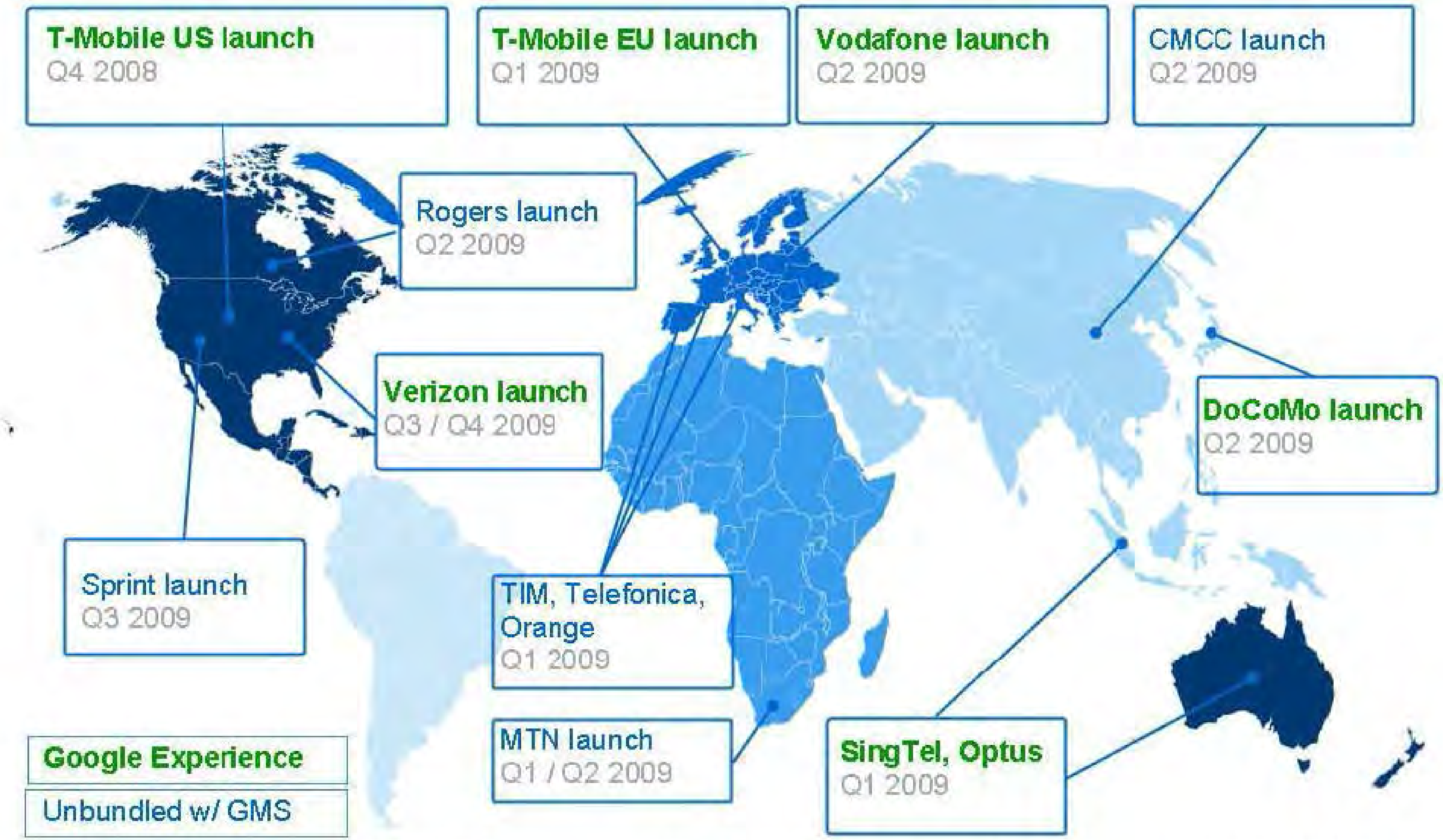


Theme: Ecosystem (Eric Chu)

Google

- Marketplace Stats
  - 2k SDK downloads per day with 13k 7-day active
  - 11k+ Developers with 2,700 apps; 1/3 paid apps
  - 43+ mil downloads with 85% users downloaded min. 1 app

- What's working
  - Android Market one of top 3 apps on phone
  - Android is one of top 3 platforms for developers

- Key Challenges
  - Paid apps download extremely low; 72k purchases so far
  - Billing cost too high for apps price point below $3.00
  - Difficult to operate, expand, & enhance service with current resource level
  - Short term difficulties in competing with iPhone for developer mindshare

Theme: Ecosystem (cont'd)

- OHA Status
  - 47 Members - 9 carriers, 9 device manufacturers, 13 Semiconductor companies,10 software companies, & 6 commercialization companies
  - With the exception of Nokia, Apple, & RIM, everyone is investing in Android deployments
- What's working
  - Market relevance achieved
  - Many companies want Google + Android = Google Experience Devices
- Key Challenges
  - Need strong "stewardship" to remain agile while preventing fragmentation
  - Difficult to both move fast and involve partners in evolution of Android

Theme: Marketing (Marc Vanlerberghe)

Google

- Key Insights
  - When carriers commit serious marketing resources, sales follow. But the reverse is true as well.
  - Carriers want Android + Google experience.
  - Google's ability to generate sales leads is unmatched.

- What's working
  - 'with Google' branding as negotiation lever for better data plans.
  - Co-marketing $ creates leverage and buys influence in campaign strategy and execution.
  - Scaling of marketing approval process.

- Key Challenges
  - Lack of differentiation between GED and non-GED w/ GMS could lead to consumer confusion and carrier frustration.
  - Increased dependency on partners for direct-to-consumer marketing
  - Small marketing team handling increasing number of launches and partnerships.

Theme: Marketing (North America Launches)

North America

1- T-Mobile G1: US Campaigns

Sustaining buzz and driving continued sales of the G1 in the US

- Sales: **~1MM phones sold to date.**

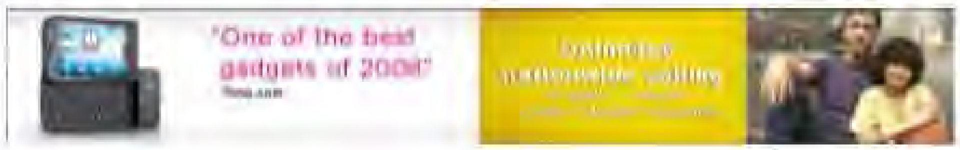
- Glowing Reviews ATL campaign
  - Highlighting selected quotes from popular sources (Time, Vibe, GQ).
  - Major continued investment from TMO-US, no additional $$ cost to Google.
  - Mass media activities: TV , Billboards , Print
  - TV: Feb' 25th - April 12th (plans to expand until July): 11 major US metros. 735MM impressions, 84.5% Reach.
  - Online and POS will highlight some new Google Apps: Latitude, Search By Voice, My tracks
- MTV Cancun Spring Break co-branding. March 7th-27th
  - Featured device on 'The Real World' show.(Airing in June)
  - "G1 Terraza" where spring break students interact with the G1. 200 G1 giveaways for trend-makers.

2- Upcoming Launches and Partnerships

- T-Mobile US: Preparing to launch the **HTC Sapphire** in July. Announcement and pre-sales in mid-June.
  - Google Experience Device.
  - Hero device for Back to School window: Major marketing push and 'with Google" branding.
- Rogers: Launching both Dream and Sapphire
  - Launching both Dream and Sapphire in Q2
  - Non Google Experience Devices
- Early engagements with Motorola (Verizon device) and Sprint.

T-Mobile G1: Glowing Reviews Campaign

T-Mobile G1 commercial "Glowing Reviews"



T-Mobile G1: MTV Cancun Spring Break

Theme: Marketing (EMEA Launches)

1- EMEA Launch of the T-Mobile G1

Launched the T-Mobile G1 **in 6 EMEA markets** (30 Oct in UK, 29 Jan in DE-AT-CZ-NL, 23 Feb in PL).

- Sales: **~115k phones sold to date**
- T-Mobile marketing activities: ran ATL and BTL campaigns in all 6 markets. All campaigns are currently live.
- Google marketing activities:
  - Co-marketing funds: Committed **$10M** to support T-Mobile's ATL campaigns ($2M spent for UK in Q4 2008; $4.8M committed in Q1 2009. $3.2M to be spent in Q2 2009)
  - Ran promotions on local Google properties, including Google homepage, Gmail, Maps, and localized mobile google.com pages, and set up house ads. **Homepage impressions totalled over 1 Billion**
  - Supported the development of T-Mobile's advertising campaigns and messaging and trained T-Mobile sales and customer support teams on technical and marketing aspects of Android and Google products

2- Upcoming EMEA Launches

- Preparing to launch the **HTC Magic with Vodafone** in 5 largest EMEA markets (UK, ES, IT, FR, DE) in April. No Google co-marketing funds or promotions, "with Google" branding contingent on data plans per market. Additional launches expected with Vodafone in 15 additional markets
- Preparing to launch the **HTC Dream with TIM, Telefonica, and Orange** (in IT, ES, FR) – and **HTC Magic with TIM in IT** – all in March/April timeframe. No Google co-marketing funds or promotions and no "with Google" branding.

T-Mobile G1: Illustrative EMEA Campaigns

Theme: Marketing (JAPAC Launches)

1-AU/SG Launch of HTC Dream with Optus/SingTel

Launched HTC Dream with Optus in AU on Feb. 5 and with SingTel in Singapore on Feb. 21.

- Sales: **~3k phones sold to date (disappointing)**
- Only BTL campaigns, limited marketing investment
- Optus Marketing activities
  - Press event for 44 journalists/bloggers.
  - Most of the marketing activities focused on online banner ads, microsite, as well as in-retail posters.
- Google Marketing activities
  - Training and demos at launch event
  - Review and approval of all collateral
  - Launch of mobile.google.xx sites in AU and SG
  - Launch of 'mobile tips' campaign to leverage Android buzz and build local story.

2-Upcoming JAPAC Launches

- Preparing to launch the **HTC Magic with NTT DoCoMo** at the end of May. Negotiating Google contribution of $5M in return for significant marketing commitment from NTT DoCoMo and/or HTC.
- Not involved yet in any China opportunities (China Mobile, China Unicom), but we should ramp up efforts as soon as there is more clarity on launch schedules.

Theme: Marketing (Commercials)

Life's for Sharing (T-Mobile UK)

Guitar Hero (T-Mobile UK)

Glowing Reviews (T-Mobile US)

HTC Magic Intro (Vodafone France-SFR) - First draft

Key Insights (Andy)

Google

- Overall strategy working
  - Marketshare looks good
  - Operator demand increasing
  - Committed deployments solid
- 1.0 lag
  - Single sourced (HTC) for 1.0
  - Other OEMs building now
  - Estimate a 6-9 month dry spell: Holiday '09 things pick up
- ~1.5 year window of opportunity
  - MSFT dormant, but not out
  - Symbian or LIMO will survive -- too early to tell which one
- Need ability to do direct marketing
  - For all Google experience devices, include a welcome message and direct-to-consumer opt-in option
  - Potentially offer consumers unlocked phones

Pain Points

Google

- Scaling the business
  - Can't launch every region
  - Prioritization is key - example: SingTel/Optus was a mistake
- Hiring
  - Filling reqs is slow and unpredictable
  - Need to hire in order to make our OKRs
- Innovation
  - Need to hire/acquire a UI team
  - Need more control over HW design
- Ecosystem health
  - Developers need a unified story
    - Don't fragment
  - GOAL: apps should run accross diverse products
  - Marketplace is a unifying service
- Payment systems
  - Checkout isn't a viable solution
    - Too slow, other priorities, legal issues

Asks

END

BACKUP

HTC

MAGIC

HERO

HERO

HERO

HERO

HERO

HERO-C

HERO-C

CLICK

CLICK

FIESTA

FIESTA

Samsung

Artemis: Design & CMF

Stylish Android Touch QWERTY

Design Concept

Refined Style

Optimized 4-line QWERTY keys

Differentiated CMF with appealing patterns

Non Slip Silicon textured back cover

Silicon Double Injection

SAMSUNG

Caesar: Design & CMF

Design Concept

Ergonomic human body

Lighting effect

Unique CMF (UV high-glossy)

Clean and simple lines

Lighting Effect (Green Light) & Ceramic Coating

Combined Metal & Plastics

Galaxy A (InfoBowl): Design & CMF

GEN Style
Emphasizing Google,
Ergonomic form

SAMSUNG STRICTLY

Galaxy B (Poet): Design & CMF

Organic Style
Easy of Use
Ergonomic form

RI

Bigfoot A (Saturn): Design & CMF

Seamless & Clean look
Smooth rounded design for comfortable grip
Youthful/ Fashionable

Targeted to the fashionable Web generation with a large Full-Touch LCD and Trackball navi-key

Easy to Use qwerty-keypad

Transparent High Glossy Material

Tracking Ball Control Navi

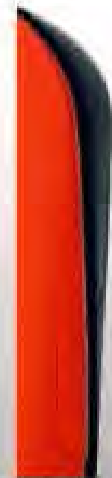
SAMSUNG STRICTLY

Vins: Design & CMF

Futuristic - Combination of softness and solid feel

Ergonomic Curves

Elegance & Ergonomic shape



Soft Touch Finish

SAMSUNG

Sprint 2009 Android Product

Instinct-Q
('09.3Q)

CDMA Android (Sprint)

- 3.2" HVGA AMOLED
- EVDO Rev.A, Dual Band(800, 1900)
- 15.9mm Thickness w/ 1500mAh Battery

Operator Features

- NFL, NASCAR, Sprint TV, Telenav GPS
- Active Sync
- FOTA (over DM)

Vivid Color
Vivid Color
High Contrast
High Contrast
Outstanding Luminescence
Better Sunlight Readability

T-Mobile / Global 2009 Android Product

Houdini / Orion

('09.2Q/3Q)

Stylish with extreme Display

- 115 x 56 x 11.9 mm
- Eco-friendly Vivid AMOLED LCD
- Tempered Glass

Rich Media Innovator

- Best Browsing Experience
- Store a nice bit of Media files in 8GB Memory
- Enjoy online service constantly with 1500mAh Battery
- Stereo BT Headset
- Video recording

SAMSUNG

Global Android Product

Spica
('09.3Q)

Compact stylish Design

- 3.0" WQVGA TFT LCD
- 12.9mm Thickness w/ 1500mAh Battery

Enhanced UI & Features

- TouchWiz UI
- Touch Player
- Rich camera shots & effects
- DM FOTA
- Standard JAVA support
- Active Sync
- Support Operator's Customization

SAMSUNG

Global Android Product

Naos
('09.3Q)

Easy Messaging

- Full Touch & QWERTY keyboard
- Instant messenger & Consumer E-mail

Rich Media Innovator

- Google Mobile Services
- Android Market
- Best Game controlling
- Enjoy online service constantly with

1500mAh Battery

Motorola

Morrison

Connect and share everywhere – from anywhere.

Type	UMTS
Battery	1400 mAh
Display	3.1" HVGA Touch
Memory	1GB internal + up to 32GB microSD
Data / Network	HSPA, Wifi, GPS
Connectivity	USB, Bluetooth 2.0, 3.5mm audio
Camera	5MP AF

Motorola
Confidential
March 2009

Motus

New design.
New experience.

Type	UMTS
Battery	1400 mAh
Display	3.1" HVGA Touch
Memory	1GB internal + up to 32GB microSD
Data / Network	HSPA, Wifi, GPS
Connectivity	USB, Bluetooth 2.0 3.5mm audio
Camera	5MP AF

Motorola Confidential
March 2009

Zeppelin

Your connections.
Your character.

Type	UMTS
Battery	1400 mAh
Display	3.1" HVGA Touch
Memory	1GB internal + up to 32GB microSD
Data / Network	HSPA, Wifi, GPS
Connectivity	USB, Bluetooth 2.0 3.5mm audio
Camera	5MP AF

Motorola
Confidential
March 2009

Sholes CDMA

Ultimate Hero Device: The Best QWERTY, In Best-in-Class Tablet Size

Unrivalled Innovation Powered by the 500Mhz OMAP3 processor, WVGA display and 3D graphics acceleration.

Google Mobile Services and Experiences delivered through Android Éclair enhancements and optimized applications.

World's Best Mobile Internet Experience enabled by Google's browser, Flash Lite, search and maps all on a huge high fidelity display.

Best in Class Messaging with an easy to use slide out QWERTY, MS exchange support and full SMS/MMS.

Rich Application and Content Expandability through OTA, PC Sync and the Android Marketplace.

SPECIFICATIONS

- QWERTY Touch Slider
- 3.7" 16:9 WVGA Display, 480x854
- CDMA 800/1900; CDMA 1X / EV-DO Rev A
- 5MP AF camera with dual-LED flash
- 8GB Memory

- 16GB and 32GB available

- Wifi 802.11 b/g
- aGPS & E-compass
- 3 axis Accelerometer and Proximity Sensor
- USB 2.0 HS, Bluetooth 2.0 EDR
- 3.5mm Headset

Sholes CDMA CMF and Cobranding

Sony Ericsson


Sensuous Black
MAR172009
MAR172009

Sony Ericsson

Rachael Sensuous Black

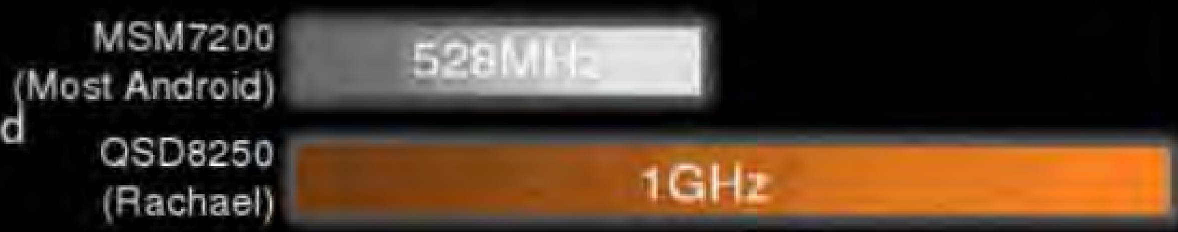

MAR 17 2009
Luster White
MAR 17 2009

Sony Ericsson

Rachael Luster White

Rachael basic specification

Tablet form factor
WVGA 4.0inch Display
Dimensions 119H x 63W x 12D (Max 13D)
Qualcomm Snapdragon 8250 1GHz clock
Capacitive full touch panel
8.1M AF camera
8GB microSD bundled(TBD)
384MB RAM/1GB ROM
Battery 1500mAh
3.5mm HP jack
SEPort: micro USB
RF variant: Triband UMTS+EDGE quad
A-GPS
BT 2.0
Wi-Fi 11b/g
Accelometer 6 axis
RTL color:TBD
MediaGo compatible as PC client



Dell

Streak Positioning

Your Dell PC to-go

World's Smallest Big-Screen

World's thinnest 5" mobile Internet device

- At <10mm and only 116cc, it easily fits in your pocket or purse so its always with you

Web in-the-pocket

Immersive PC-like browsing/surfing

- 5" (800 x 480) screen for full page view
- Motion sensors & multi-touch gestures for simple easy manipulation of pages
- Performance & capability to consume the full web (not mobile web)

Immersive Entertainment

Movies, TV shows, web streaming to-go

- Beautiful large 5" with HD content playback
- Simple access to all your content

Taking my Dell on the-go

Synch/sharing of all my content on my PC

- Stream, download, access all of my photos, videos, music, and files from my home PC
- Seamless sync my email, contacts, calendar
- Easily upload directly to my PC

DELL
YOURS IS HERE

Smartphone Roadmap

Roll-out strategy:

- China Touch Q2 CY09
- EMEA Touch Q3 CY09
- US Touch & Touch Qwerty Q4 CY09

Flare *(Gen Y, social networking, you "gotta have" device for me and my friends)*
3.5" WVGA, 3MP Camera, Touch & Qwerty, Android OS, TRI-BAND UMTS/EDGE/WiFi/GPS/BT
Q4 CY09

Spark *(Uncompromised multi-tasking for the business professional)*
3.5" WVGA, 3MP Camera, Touch & Qwerty, Android OS, TRI-BAND UMTS/EDGE/WiFi/GPS/BT
Q4 CY09

Blaze *(Discerning individuals looking for the best balance of style and capabilities)*
3.5" WVGA, 3MP Camera, Touch only, Android OS, TRI-BAND UMTS/EDGE/WiFi/GPS/BT
Q2 CY09

Beacon TD (CMCC)
Blaze Specs + TD-SCDMA + 5MP Camera
Q1 CY10

Benzina *(Trendsetting professional, style and image conscious, willing to pay for the very latest, wants the world to see, I have "it")*
3.5" WVGA, 3MP Camera, Touch only, Android OS, EDGE/WiFi/GPS/BT
Q2 CY09

Benzina 3G Refresh (AT&T)
Benzina Specs + Dual Band UMTS + 5MP Camera
Q4 CY09

Q1 FY10			Q2 FY10			Q3 FY10			Q4 FY10			Q1 FY11			Q2 FY11		
Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul

Dell Confidential

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Dell Confidential

leather texture

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BLAZE
01:50 PM
DELL
YOURS IS HERE

BLAZE

DELL
YOURS IS HERE

from first look, **SPARK** exudes performance

large full touch display

purposeful controls throughout the device

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SPAR K

hi. I am **FLARE**

for the social networker

expressive & energetic

come join my tribe

UI optimized for touch

best, largest screen in class

DELL
YOURS IS HERE

FLAR
E

TWIS
T

Desirable

TWIS
T

Inspired

TWIST

BEACON

STREAK: Pushing ID Limits

NCVM for premium finishes, Picasso for personalization

5" diagonal capacitive touch display with WVGA 800x480 resolution

5 megapixel camera with autofocus and flash

Front VGA camera for video chat

30-pin system connector

Capacitive touch front buttons

STREAK: Accessories

An ecosystem of accessories styled to match the handset and support the

Not shown: auto/air charger, auto cradle etc.

SDE&A | Speaker Dock **Flute**

Partner Update (Jennie - text version)

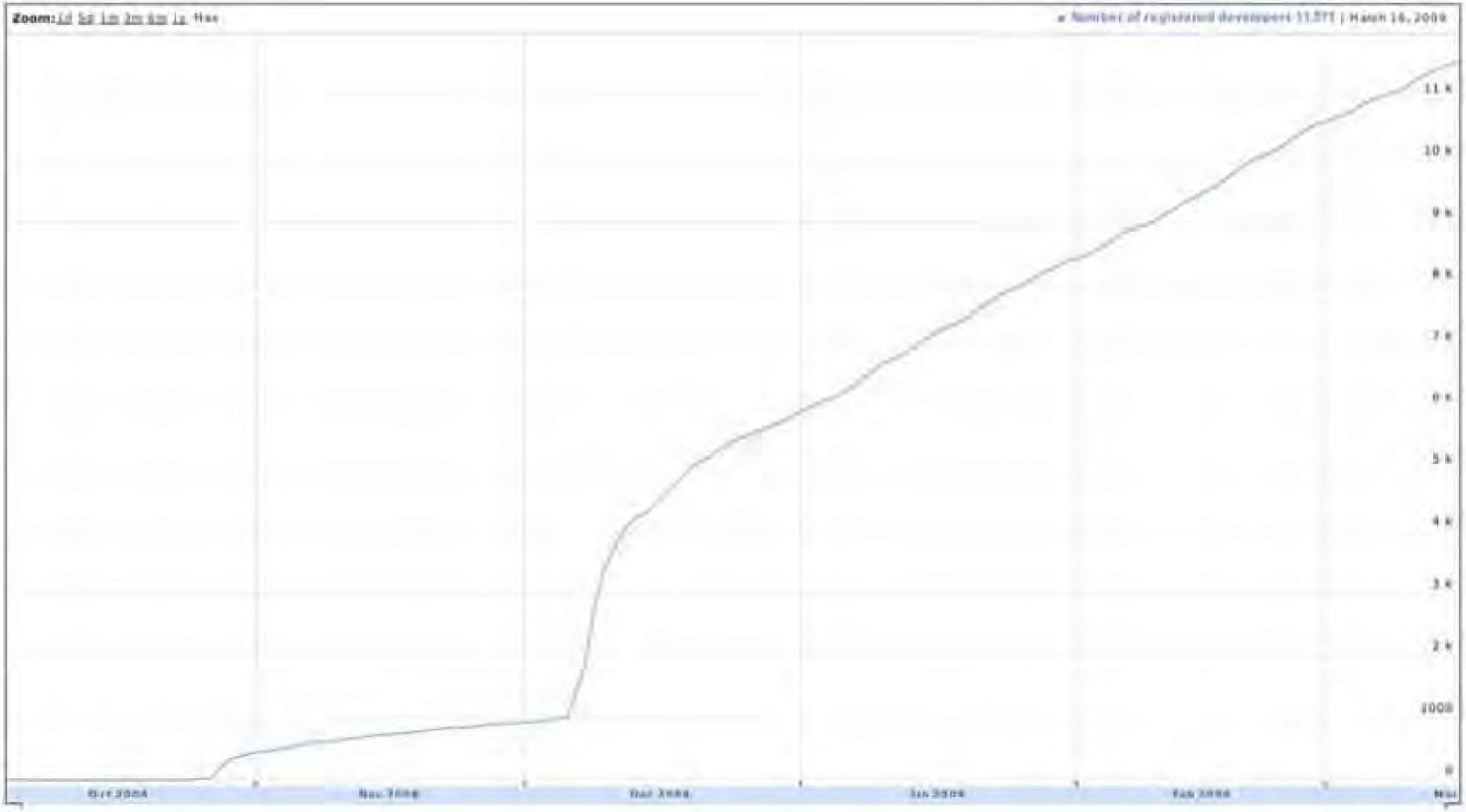
- Google Experience opportunities
  - T-Mobile negotiating amendment underway
  - Singtel-Optus Agreement completed and device launched
  - Vodafone Master Agreement completed
    - Five Contract of Adherences executed with France, UK, Italy, Spain & Germany
  - Docomo definitive agreement negotiations undeway
  - Verizon term sheet negotiations underway
  - CMCC & China Unicom
- Unbundled GMS + Android Open Source pipeline:
  - OEMs: HTC, Moto, Dell, SEMC, Samsung, ASUS, LG, Lenovo, Acer, Quanta, Kyocera, Huawei, Sharp, toshiba, Panasonic, NEC, Inventec, Foxconn
  - Android Market only for Operators: Sprint, Roger, Bell
- Other key Android deals
  - SVOX - text to speech
  - Paypal - Android market
  - AMDOCS - Carrier billing support
  - ASUS
  - Android for TV discussions w/ Ben
  - Android for netbook discussions w/ Sundar

Theme: Disruption

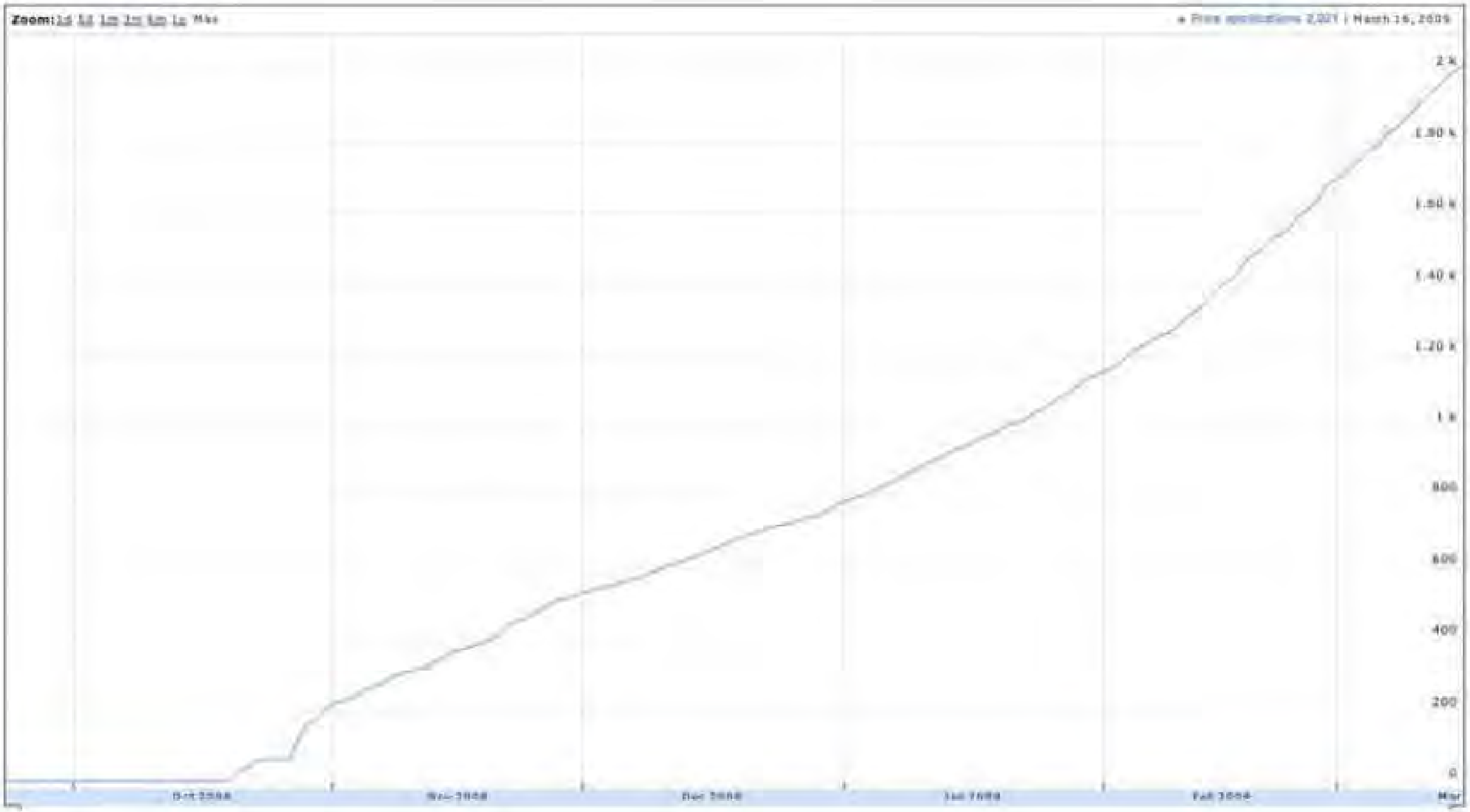
- Mobile Platform
  - Changed mobile platform landscape - Nokia, Microsoft, Limo adjusted their strategy
- Semiconductor companies
  - Android is now the Linux platform for chip vendors- Qualcomm, TI, Marvell, etc.
  - Example: QCOMM has 40 Android-based design wins
- OEM
  - Leveraging Android and Google to minimize carrier wall garden and requirements
  - Replaced Symbian and Windows Mobile in many smartphone devices
- Carriers
  - Willing to "experiment" with no carrier-control open service & device model - T-Mobile, Vodafone, NTT DoCoMo, etc.
  - Using Android to lessen Nokia and Apple influence
- Developers
  - Android is ahead of Java, S60, & WinMo as premier mobile platform to target
  - Developers want Android Market to be the one and only content "store" for Android
- Users
  - Android users access the internet & connected services more

Developers

Google

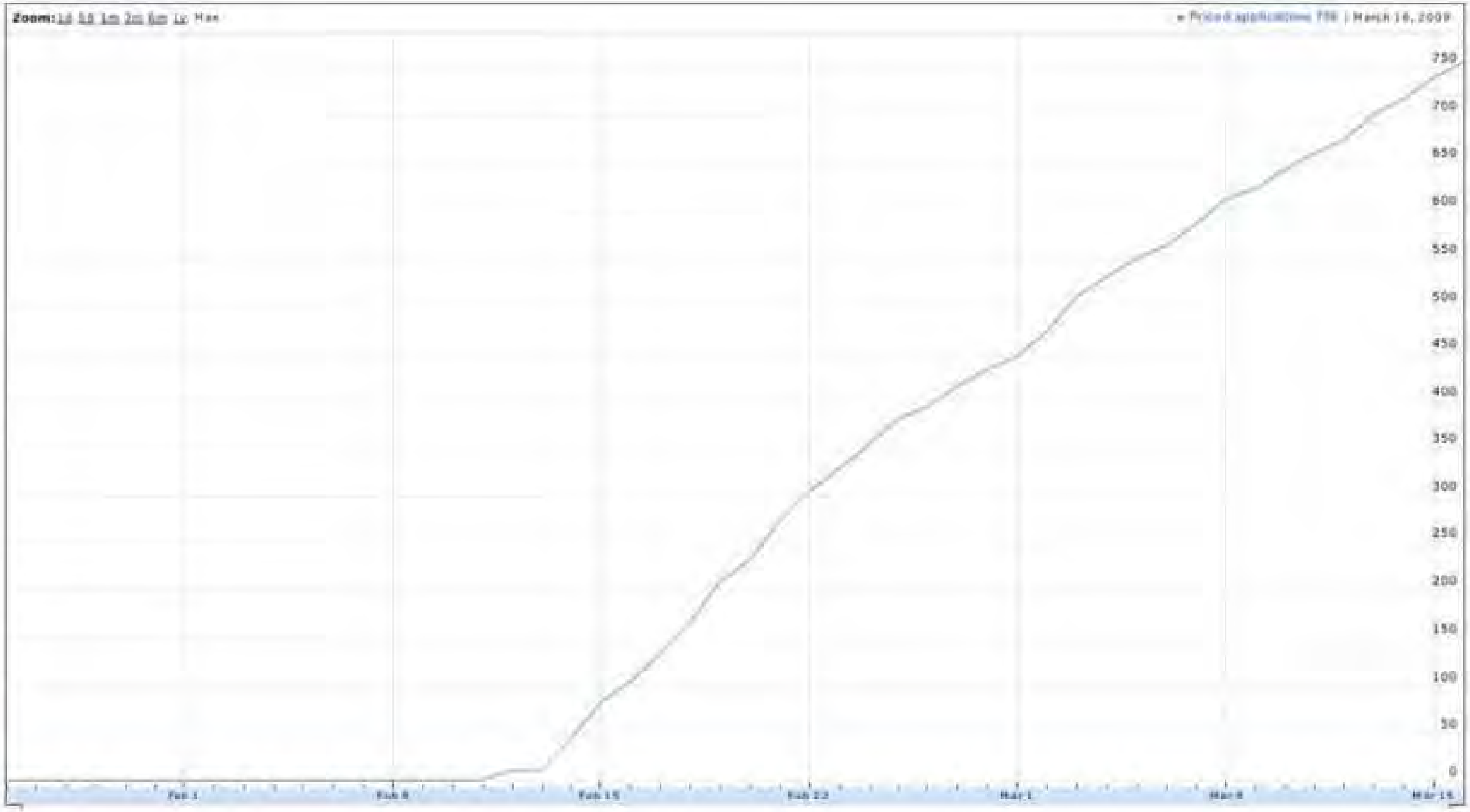


Free apps

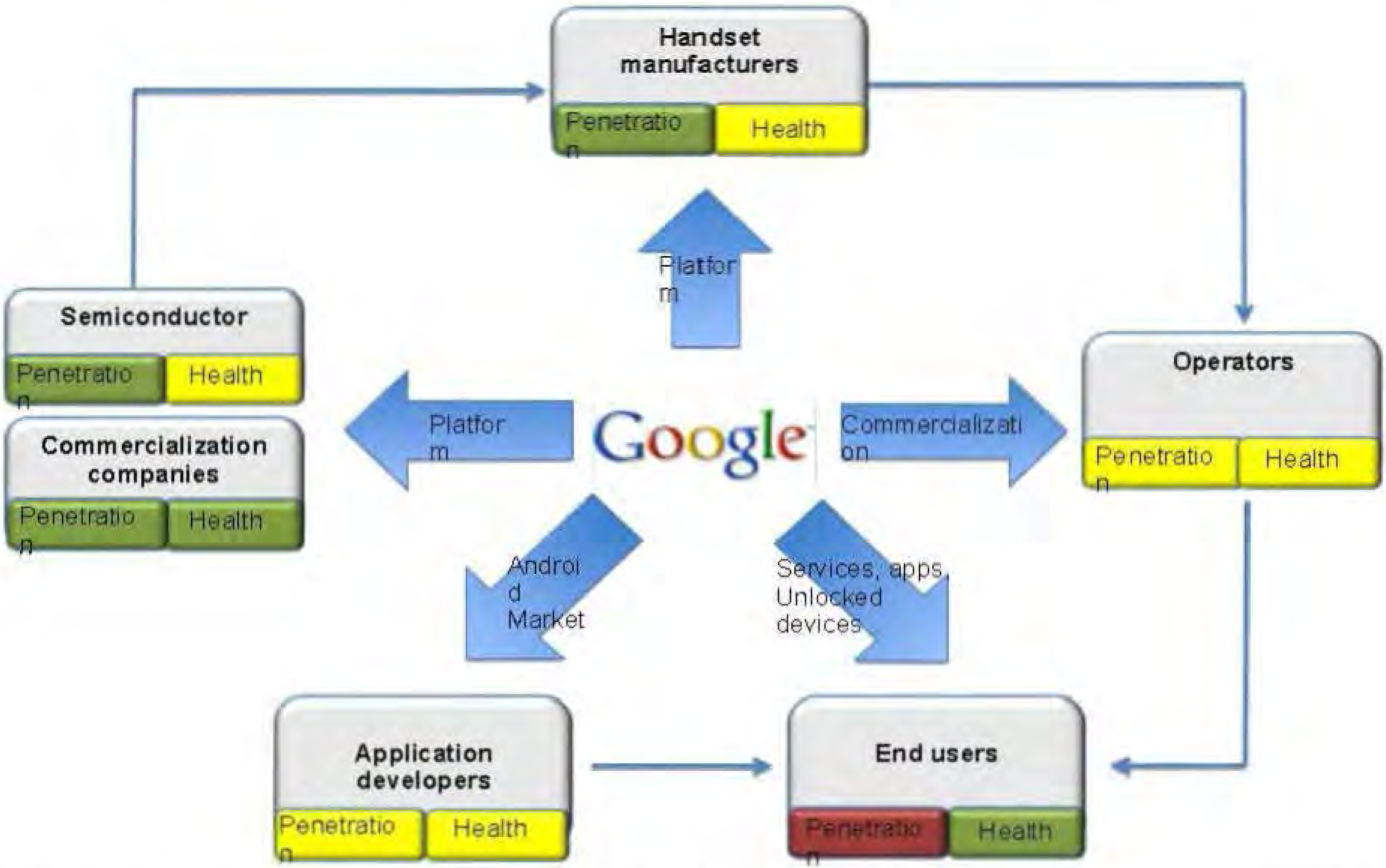


Google

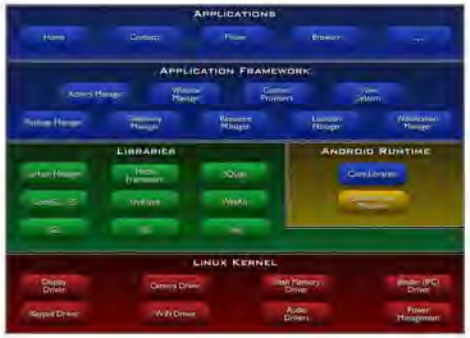
Paid apps



Android ecosystem state



Three Sub-Efforts Work in Concert



Android Open Source Platform

- Organic Adoption
- Includes HTML browser
- The real revenue opportunity

Unbundled Google Apps

- Depends on Android Platform
- Normal SPD sales path
- Unblocks OEMs from distributing Google apps
- Apps auto-update themselves

Google Experience Devices

- Two devices per year
- Tightly integrated "with Google" (branded?)
- Managed device: OTAs, setting storage, mandatory GAIA, etc.
- Deep carrier partnerships
- Only will consider volume > 1M

Google Experience Deployments

Deployment Summary

Today
- time lag: 1 OEM and 9 operators launched

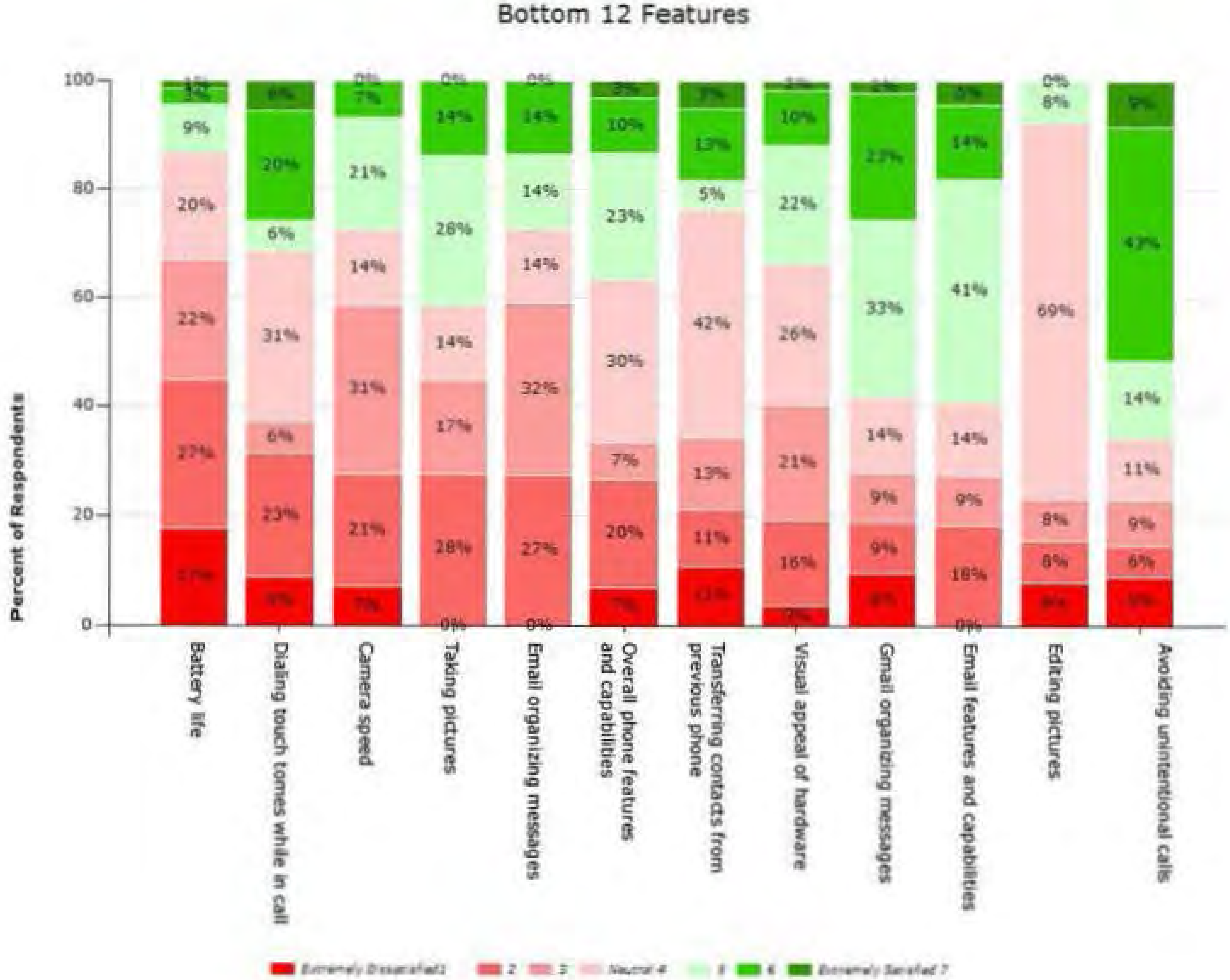
By year end...
- 9+ major OEMs with handsets in market
- 15+ unique device models in market
- 20+ operators launched

Challenges
- Beachheads: each OEM's / operator's first device
- Dependencies between partner, platform launches (schedules)
- Filling reqs and bringing people on in fast lane

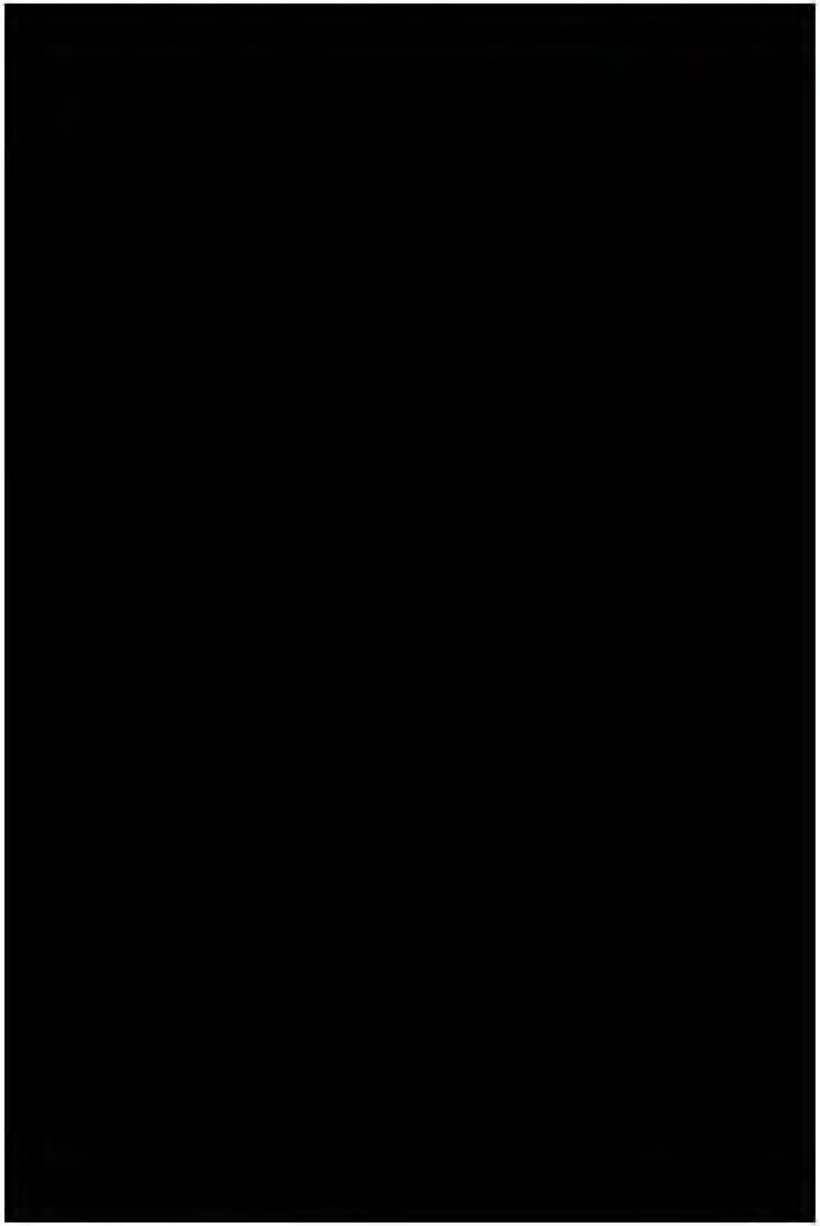
Product Slides

Backup Material

Top 1.0 Customer Complaints



Dialing touch tones during a call...



Before

After